

2020

MARYLAND ECONOMIC ANALYSIS

ANNUAL REPORT



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Introduction

The COVID-19 pandemic presented myriad challenges to Maryland residents and businesses in 2020 that continue to reverberate throughout the state, affecting nearly all aspects of public life.

This report focuses on one aspect of the pandemic during 2020: employment impacts in the state. Faced with rapidly changing uncertainties throughout the year, Maryland employers and workers demonstrated remarkable adaptability as the crisis wore on. Each industry and area around the state faced unique challenges and showed unique resiliencies. Some were more able to weather the initial shock, and others earned distinction in how they bounced back after that shock.

Looking back with the best available data, this report analyzes employment challenges and successes during this unprecedented year. The next section provides a high-level look at statewide employment trends, followed by an industry-by-industry examination. The following section analyzes employment trends in each of Maryland's workforce areas, with a closer look at the industries within each area demonstrating the greatest resiliency throughout 2020. Finally, the Data Appendix provides all the data used in this report to assist readers wishing for additional detail within a particular area or industry.

Statewide Analysis

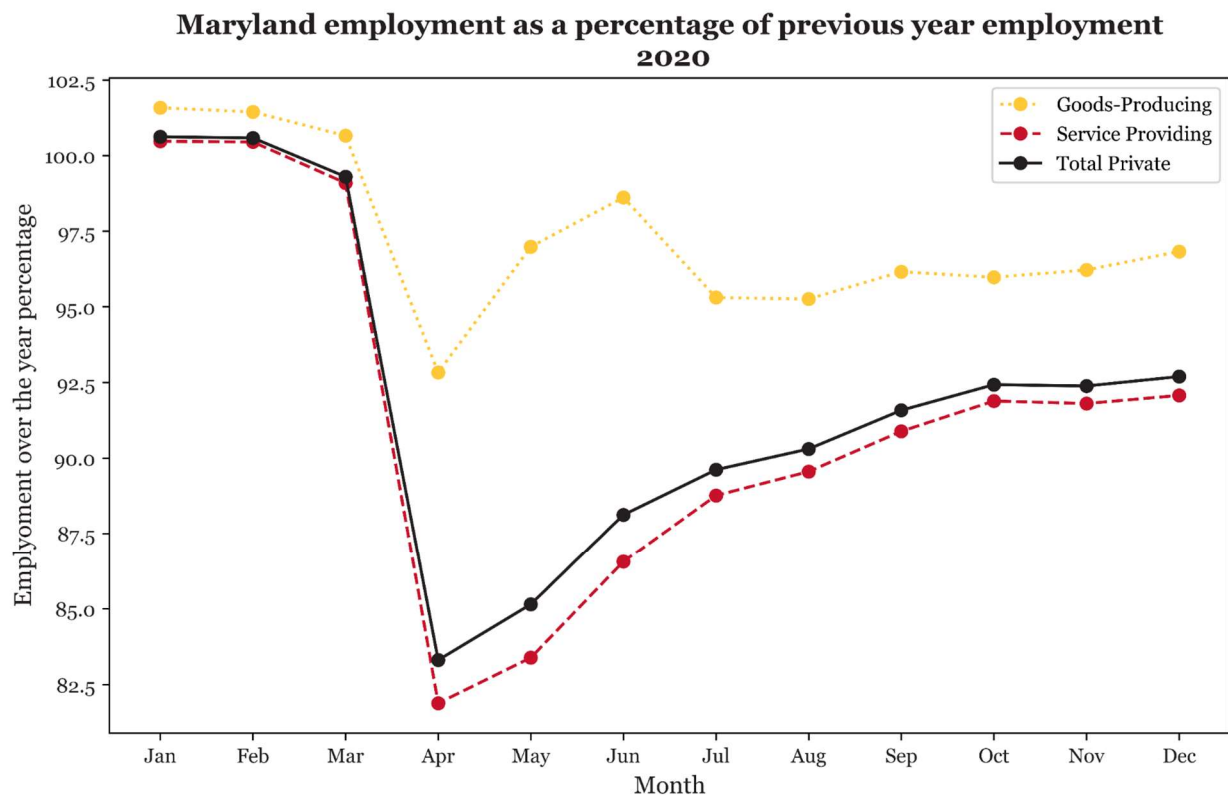
With shutdowns, non-essential stay-at-home orders, and other measures to “flatten the curve,” employment in Maryland saw a 13.1% decrease from January to April 2020. By December 2020, employment rebounded to 95.6% of its level at the beginning of the year.

Faced with the unprecedented disruptions to businesses and consumer demand, employment in private service-providing industries decreased by 17.2% between January and April 2020. However, by December 2020, employment rebounded to 94.6% of the level at the beginning of the year, with the largest gains between April and June 2020.

Goods producers saw a relatively smaller initial impact during the pandemic, seeing a 6.9% slide in April 2020 employment, compared to the beginning of the year. By December 2020, employment rebounded to 98.4% of the pre-pandemic level. The path to recovery for goods producers saw a sharp recovery from April to June with a slight setback in July, followed by a steady recovery to the end of the year.

The chart below analyzes employment in a slightly different manner, by comparing employment levels each month with the same period 12 months prior. This year-over-year index is more useful when looking at specific months. Employment, particularly in the service sector, can vary substantially from month to month. The index measures how employment compares to a year earlier, as a percentage. For example, a value of 100 indicates

that employment is the same as it was 12 months prior (i.e. 100% of the level from a year earlier). Similarly, a value of 110 implies that employment has grown by 10% compared to the same month last year. The chart below uses this year-over-year employment index to show the steady jobs recovery over the last eight months of 2020. Maryland's economy and employment is predominantly service oriented, so the trend in the total private employment index most closely matches the service industry index.



Similar to the discussion above, the following subsections evaluate statewide employment trends in each industry. Given the strong seasonal employment patterns in many of these sectors, most analysis is performed using the year-over-year framework, unless otherwise noted in the text. For detailed data, including for industry subsectors, see the statewide industry tables in the Data Appendix. Note that “sector” and “industry” are used interchangeably, while “subsector” refers to specific subsets of companies within those industries. Capital letters are used stylistically to denote specific industries or subsectors. For example, “Agriculture, forestry, fishing and hunting” refers to a single industry, while the two capital letters in “Manufacturing and Construction” indicates these are two distinct industries.

Goods-Producing Industries

Agriculture, forestry, fishing and hunting



Agriculture, forestry, fishing and hunting saw an overall employment increase from January to April of 16.8%. Despite some job losses between April and December 2020, over the year employment in December was 5.4% higher than in December 2019. Much of the loss and recovery centered in Crop production. That subsector experienced gains from January to April and a slight decrease through December 2020 with a net increase over the January 2020 baseline.

Mining, quarrying, and oil and gas extraction

Employment in the natural resource extraction industry was relatively stable over 2020, despite significant impacts to most other industries. This employment stability continued the industry's trend from 2019.

Construction

The construction industry began in 2020 with strong employment growth, though April saw a 6.8% decrease in employment when compared to January 2020. Much of this decrease was driven by employment losses in its largest subsector, Specialty trade contractors, which had a March to April decrease of 7,987 jobs. After the initial employment shock in April, the subsector recovered steadily through December 2020 with 6,567 of the lost jobs regained by the end of 2020. The overall Construction sector mirrored this recovery, with December 2020 (161,630 workers) employment only 3.1% lower than in December 2019 (166,783). The Construction sector saw the addition of 9,903 positions (6.5% growth) from April 2020 to December 2020.

Manufacturing

In April 2020, there were about 10,000 fewer jobs, compared to the month prior. Printing and related activities was most significantly affected by pandemic shutdowns, having 18.8% fewer employees in April 2020 compared to the beginning of the year. Paper manufacturing had proportionately fewer employees over the year in April 2020, though this was part of an already existing trend; the first three months of 2020 saw employment levels lower than in 2019. Machinery manufacturing suffered a notable employment decrease in April 2020, with 1,206 fewer employees compared to the prior month. By December 2020, 69.1% of the Manufacturing jobs lost earlier in the year had been recovered. Food manufacturing,



Printing and related activities, and Machinery manufacturing led the way in April to December 2020 employment gains with 1,345 jobs gained, 1,108 jobs gained, and 983 jobs gained respectively.

Industry subsectors relatively less affected by the pandemic were Wood product manufacturing, Chemical manufacturing, and Computer and electronics manufacturing. Chemical manufacturing experienced an increase in employment of 0.7% from January to April 2020.

Utilities

The utilities sector was also relatively unaffected by the COVID-19 pandemic. January to April 2020 saw a decline of less than 1% of employment. Employment in April 2020 was 1.7% higher than in April 2019. Employment remained steady through December 2020 with nearly equal employment compared to December 2019.

Service-providing industries

Accommodation and food services

With substantially reduced customer demand, this sector faced major challenges due to the pandemic. Accommodation and food services experienced a January to April employment decrease of 48.1%. By December 2020, 58,588 jobs had been recovered.

Food services, the largest of the subsectors, drove the direction of the decrease and recovery in this sector. By December 2020, Food services and drinking places recovered 57.9% of jobs lost at the beginning of the pandemic. Recovery of Accommodation employment lagged behind food services, with employment in December 2020 representing a 29.1% recovery of jobs lost at the beginning of the pandemic.



Administrative and waste services

Administrative and waste services jobs ebbed by 17,870 in April 2020 compared to the start of the year, a decrease of 10.8%. The industry exhibited strong and sustained jobs recovery, with May - November each posting more employment than the previous month. After a slight decrease in employment for the month of December, a full two-thirds of the lost jobs had been recovered (11,869 jobs gained from April - December 2020).

Of the two subsectors, Waste management and remediation services was the least impacted, experiencing a jobs decline of 4.9% from January to April 2020. Administrative and support services, the larger of the two subsectors, had more room for growth during the recovery period. This subsector added 11,496 jobs between April and December to end the year just 3.8% shy of the January 2020 baseline.

Arts, entertainment, and recreation

One of the hardest hit sectors in the Maryland economy, Arts, entertainment and recreation saw a January through April employment decrease of 58.3%. The overall sector trend followed the largest subsector, Amusements, gambling, and recreation. This subsector faced the largest January to April decrease of the three subsectors, shedding 63.5% of jobs in that time period. However, this subsector also led the recovery, with 61.6% of jobs lost regained by December 2020. This paved the way for an overall industry recovery of 54.6% of jobs lost at the start of the pandemic.

Educational services

After two months of job growth, private Educational services also experienced a pandemic related decrease in April 2020, shedding 7,948 positions from its March 2020 high point. Coupled with the typical summer

workforce reductions, the recovery in this sector started in September 2020. From its pandemic low in August 2020 to its post-pandemic high of 2020 in December, the industry recovered 4,508 positions. In addition to employment lulls in the summer, this sector also experienced slower hiring in December.

Finance and insurance

The Finance and insurance sector's employment levels remained relatively stable through 2020. After a 3.4% decrease in April 2020, 87.5% of jobs lost had been recovered by December 2020.



Securities, commodity contracts, and investments suffered the fewest employment losses among the industry's subsectors in April 2020, with less than a 1% reduction in employment. It also experienced year over year growth for each month from May through December 2020. Job recovery and gains more than offset the minor losses suffered early in the pandemic.

The two largest subsectors, Credit intermediation and related activities and Insurance carriers and related

activities, followed a similar pattern to the parent sector, facing a less than 4% decrease in April 2020, followed by a steady recovery throughout the rest of the year.

Healthcare and social assistance

Driven by impacts to the Ambulatory care and Social assistance subsectors, the Healthcare and social assistance sector saw a decrease in employment due to the COVID-19 pandemic. Hospitals kept staffing at near normal levels throughout the pandemic, with the exception of a decrease in July 2020. Nursing and residential care facilities saw reductions in staffing, leveling off at about 10% below the baseline level set in January 2020. Among the industry subsectors, Social assistance was most impacted by the pandemic. However, its recovery began immediately in May 2020, with 4,177 total positions added between April and December 2020.

Information

In April 2020, businesses in the Information sector employed 9.4% fewer workers than in January 2020. This was after three months of year-over-year growth to begin the year. In contrast to other industry sectors, Information saw additional decreases after April 2020, with further losses in May and June. A recovery began in July, and by December 2020, there were 438 more jobs in Information than in the May 2020 employment low.

Motion picture and sound recording was heavily impacted by the pandemic, with a decrease of 52% of workers in April 2020. This pattern continued through the end of 2020, with December 2020 employment 53.3% less than December 2019 employment.

Management of companies and enterprises

April 2020 saw an 11.4% decrease in employment for the Management of companies and enterprises sector. May 2020 represented the low mark for employment, having 17.3% fewer employees than May 2019. The first three months of 2020 saw small, over-the-year decreases of 3 - 4%. This sector experienced a remarkably recovery, with an especially large gain between June and July of 3,263 positions, returning it to the March 2020 employment level. After net employment gains of 8.2% from April to December, 63.6% of jobs lost between January and April had been recovered.

Professional and technical services

Following an employment decrease of 3.4% in April 2020, Professional and technical services made a strong recovery. December 2020 employment was slightly higher than 12 months prior. From April 2020 through December 2020, with 10,318 jobs added, the sector regained its year-start employment level and add an additional 17% over jobs lost in the early pandemic.



Real estate, rental and leasing

Real estate, rental, and leasing saw a 10.1% decrease in employment from January to April 2020. Of these, 21.9% had been recovered by December 2020. Rental and leasing services, the smaller of the two sub sectors, was more deeply impacted by the pandemic, with an 18.7% decrease in employment in April 2020. In December 2020, employment was 3.1% lower than in April 2020. The larger subsector, Real estate, saw a decrease of 7.4% in April, but had recovered 48.1% of lost jobs by December 2020.

Retail trade

Among the more deeply impacted sectors during the COVID-19 pandemic, retail trade saw April 2020 employment 20.3% lower than at the year's start. Retailers proved resilient and adaptive as 95.3% of retail jobs lost had been recovered by December 2020.



Clothing and clothing accessories stores were the most impacted by the pandemic, with April employment 69.6% lower than January employment. After dropping more employees in May 2020, employment in this industry subsector doubled in June, and nearly doubled again in July. From there, each month saw employment gains through December 2020, when 87.8% of jobs lost had been regained.

Transportation and warehousing

Transportation and warehousing employment saw a 7.1% decrease at the beginning of the pandemic. However, from January 2020 to December 2020, a net of 16,952 new jobs were added in Transportation and warehousing. Much of this growth was driven by strong gains in Couriers and messengers and Warehousing and storage. Relative to 2019, each month of 2020 had higher employment than the same month in the prior year.

Transit and ground passenger transportation sub sector faced greater challenges during the pandemic, shedding about one third of workers in April 2020. By the end of the year, nearly 40% of this employment loss had been reversed.

Wholesale trade

Employment in Wholesale trade saw an over the year decrease of 8.3% between January 2020 and April 2020. By December 2020, 33.6% of these lost jobs had been recovered. Merchant wholesalers of non-durable goods faced a January to April decrease of 11.5%. By the end of 2020, Merchant wholesalers of non-durable goods recovered 32.8% of jobs lost at the beginning of the pandemic.

Other services

Other services (except public administration) experienced a 32.4%% decrease in employment from January through April 2020. Membership associations and organizations was notably more resilient than other subsectors in this sector, experiencing a relatively smaller employment decrease of 11.9% at the beginning of the pandemic. By December 2020, 38.6% of those jobs had been recovered. Employment in private households made the strongest recovery in the sector, regaining 75.9% of jobs lost at the start of 2020.

Workforce Areas

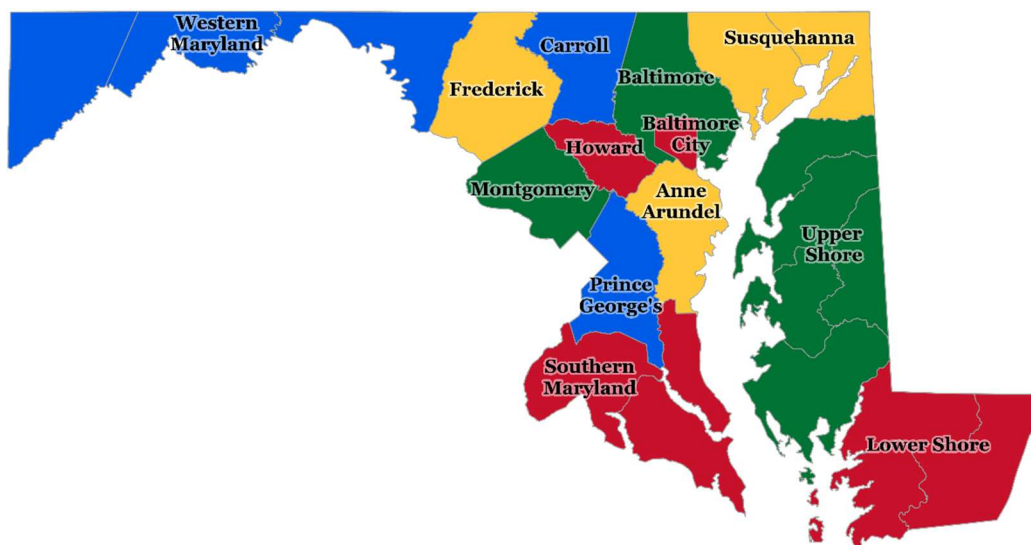
Grappling with unprecedented covid-related challenges in 2020, Maryland's 13 workforce areas faced unique setbacks and demonstrated strong resilience as the year progressed. This section analyzes 2020 employment trends in each workforce area. Economic strengths and employment challenges are identified.

The analyses in this section makes extensive use of year-over-year comparison. A year-over-year analysis compares current data to the same data from 12 months earlier. For example, employment at goods-producing companies in Anne Arundel County Workforce Area during December 2020 was 103% of the level in December 2019, or 3% higher than the year prior (see chart in following subsection). The primary benefit of year-over-year analysis is that it takes seasonal employment trends into account. In this type of analysis, numbers over 100 represent employment growth relative to a year earlier, while numbers below 100 represent a relative shrinking in employment. For example, an employment index of 102 implies that 2% more people were employed

compared to the year prior. Unless otherwise noted, workforce area employment trends in this section are calculated as year-over-year.

In addition to the analyses below, complete statistics by area, month, and industry are provided in this report's Data Appendix.

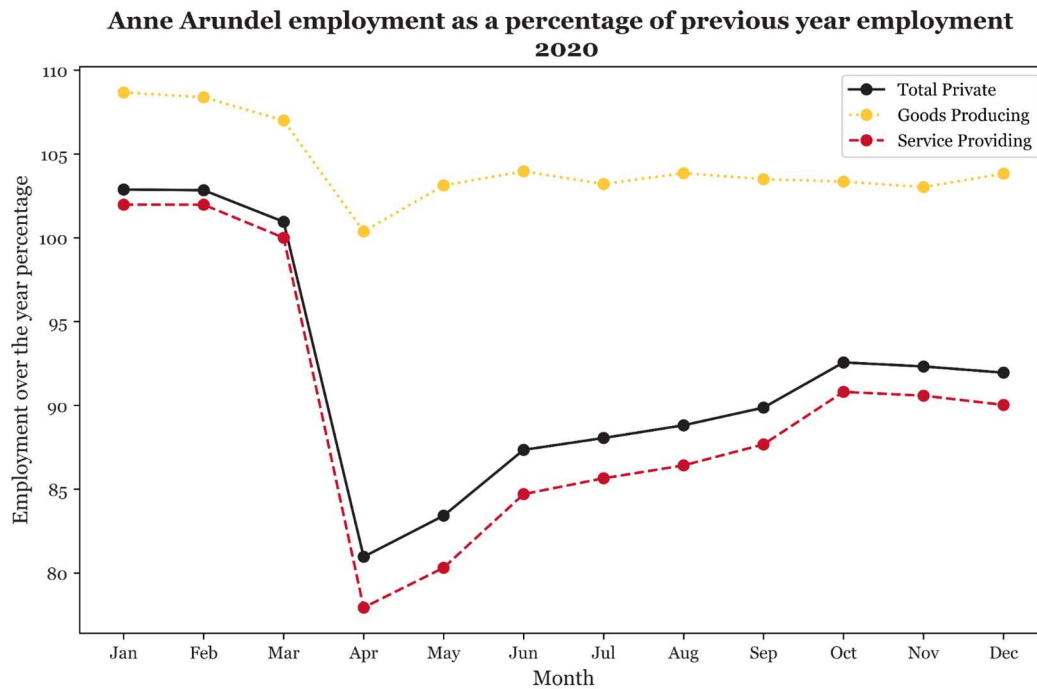
Maryland Workforce Areas



Anne Arundel County Workforce Area

The Anne Arundel County Workforce Area (Anne Arundel) experienced a 19.9% decrease in employment from January 2020 to April 2020, moving from 228,393 jobs to 182,903 over that time period. By December 2020, the area recovered 63.3% of lost jobs.

Goods-producing industries in Anne Arundel experienced a January to April decrease in employment of 5.6%, making it the fourth most resilient workforce area for goods-producing industries. By December 2020, goods-producing industries recovered 146.0% of jobs lost through April, ranked first among all workforce areas. Service-providing industries in Anne Arundel experienced a 22.3% decrease in employment from January to April 2020. By year-end, service-providing industries recovered 59.8% of jobs lost through April.



The industries in Anne Arundel with the greatest employment stability at the start of the pandemic were Utilities; Professional, scientific, and technical services; and Finance and insurance. Compared to other workforce areas, Anne Arundel had the sixth most resilient Utilities industry, which saw a January to April decrease of 1.8%. Among all workforce areas, Anne Arundel had the fourth most resilient Professional, scientific, and technical services industry, which saw a January to April decrease of 2.7%. Finance and Insurance saw a decrease from January to April of 3.5%. Compared to an average jobs loss of 13.1% in industries statewide, these industries demonstrated significant stability.



The industries with the strongest employment recoveries in Anne Arundel were Manufacturing; Construction; and Professional, scientific, and technical services. Anne Arundel experienced the strongest Manufacturing recovery of all workforce areas. Of jobs lost between January and April, 163.5% had been recovered by December 2020. Anne Arundel experienced the second strongest Construction recovery of all workforce areas. Of jobs lost between January and April, 137.8% had been recovered by December 2020. Anne Arundel experienced the fifth strongest Professional, scientific, and

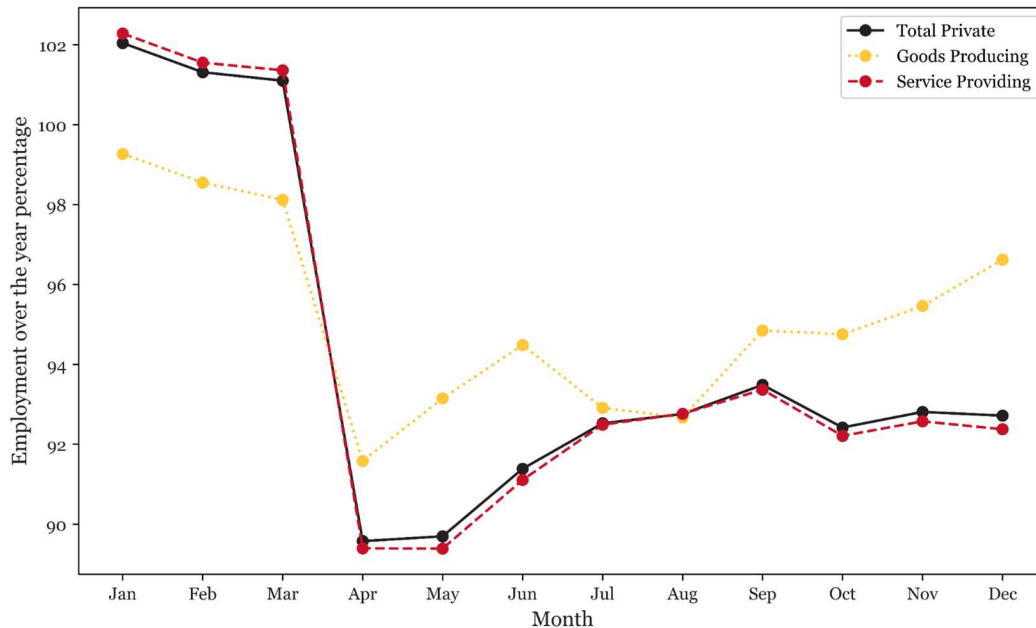
technical services recovery of all workforce areas. Of jobs lost between January and April, 134.5% had been recovered by December 2020.

Baltimore City Workforce Area

The Baltimore City Workforce Area (Baltimore City) experienced a 10.7% decrease in employment from January 2020 to April 2020, moving from 274,804 jobs to 245,329 over that period. By December 2020, the area recovered 49.4% of lost jobs.

Goods-producing industries in Baltimore City experienced a 7.3% decrease in employment from January to April 2020. By December 2020, goods-producing industries recovered 75.7% of jobs lost through April. Service-providing industries in Baltimore City experienced a January to April decrease in employment of 11.0%, making it the most resilient workforce area for service-providing industries. By year-end, service-providing industries recovered 47.8% of jobs lost through April.

**Baltimore City employment as a percentage of previous year employment
2020**



The industries in Baltimore City with the greatest employment stability at the start of the pandemic were Management of companies and enterprises; Transportation and warehousing; and Educational services. Compared to other workforce areas, Baltimore City had the most resilient Management of companies and enterprises industry, which actually saw an increase from January to April of 24.2%. Also among all workforce areas, Baltimore City had the most resilient Transportation and warehousing industry, which experienced an increase from January to April of 21.8%. Compared to other workforce areas, Baltimore City had the most resilient Educational services industry, which had an employment level increase from January to April of 0.8%. Compared to an average jobs loss of 13.1% in industries statewide, these industries demonstrated significant stability.



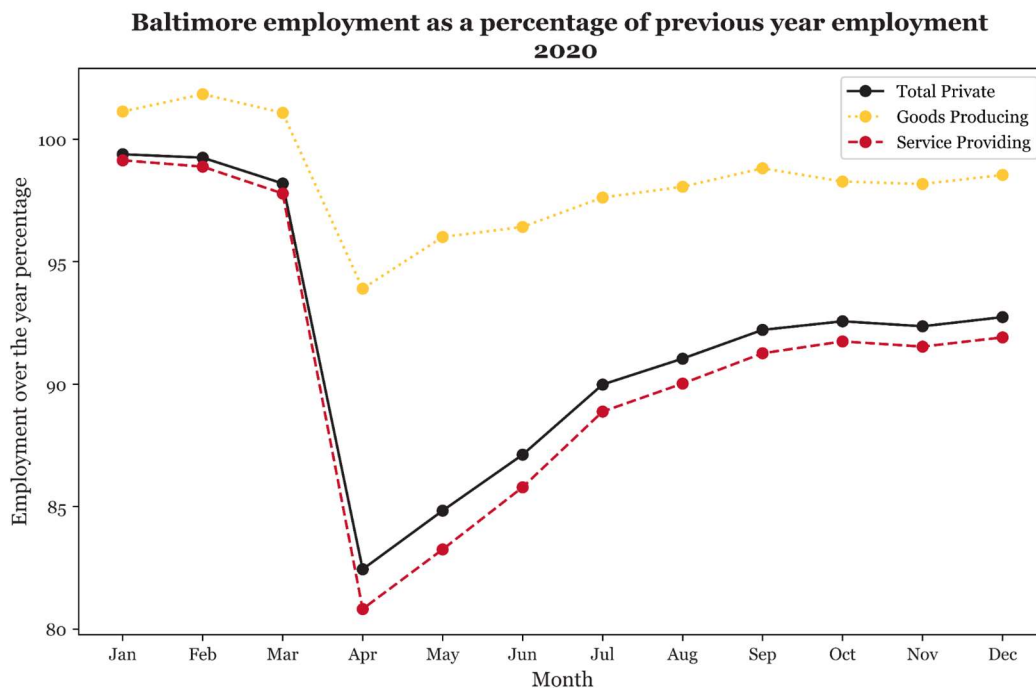
The industries with the strongest employment recoveries in Baltimore City were Professional, scientific, and technical services; Construction; and Retail. By December 2020, 99.8% of Professional, scientific, and technical services jobs lost between January and April had been recovered. In the

Construction industry, 89.6% of jobs lost had been recovered by December 2020. For Retail, the recovery stood at 68.2%.

Baltimore County Workforce Area

The Baltimore County Workforce Area (Baltimore County) experienced a 16.4% decrease in employment from January 2020 to April 2020, moving from 317,776 jobs to 265,677 over that time. By December 2020, the area recovered 75.9% of lost jobs.

Goods-producing industries in Baltimore County experienced a January to April decrease in employment of 6.6%, making it the fifth most resilient workforce area for goods-producing industries. By December 2020, goods-producing industries recovered 102.0% of jobs lost through April, ranked fourth among all workforce areas. Service-providing industries in Baltimore County experienced a January to April decrease in employment of 17.8%, making it the fifth most resilient workforce area for service-providing industries. By year-end, service-providing industries recovered 74.5% of jobs lost through April, ranked sixth among workforce areas.



The industries in Baltimore County with the greatest employment stability at the start of the pandemic were Utilities; Finance and insurance; and Transportation and warehousing. Compared to other workforce areas, Baltimore County had the most resilient Utilities industry, which actually saw an increase from January to April of 19.8%. Among all workforce areas, Baltimore County had the sixth most resilient Finance and insurance industry, which saw a January to April decrease of 2.5%. Baltimore County had the second most resilient Transportation and warehousing industry, which saw a January to April decrease of 3.3%. Compared to an average jobs loss of 13.1% in industries statewide, these industries demonstrated significant stability.



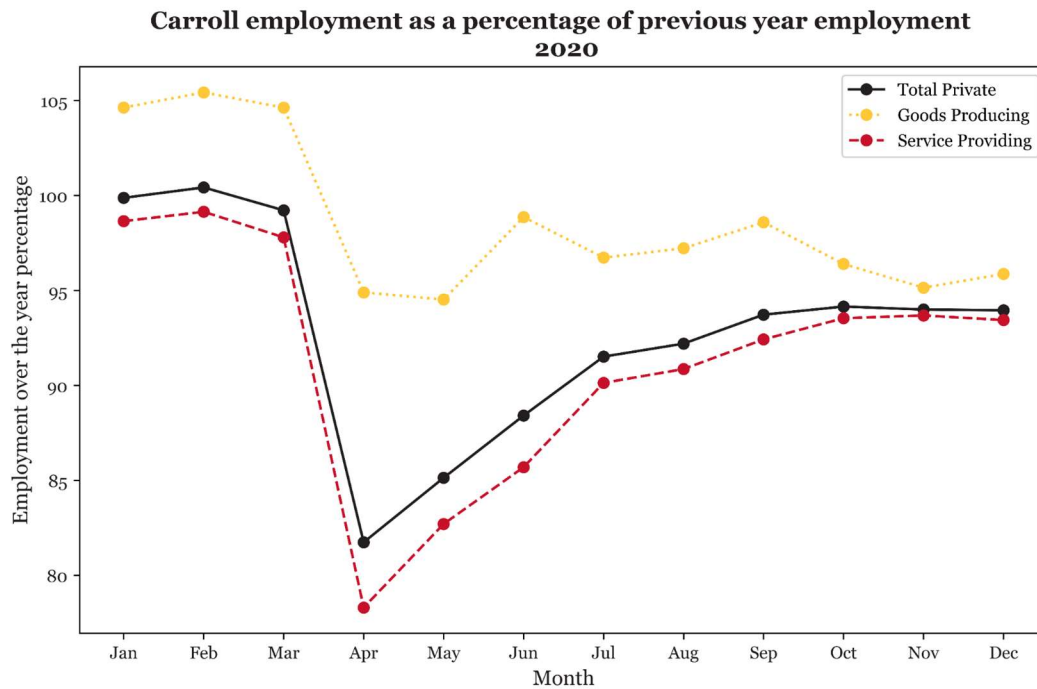
The industries with the strongest employment recoveries in Baltimore County were Transportation and warehousing; Management of companies and enterprises; and Construction. Baltimore County experienced the second strongest Transportation and warehousing recovery of all workforce areas. Of jobs lost between January and April, 1338.3% had been recovered by December 2020. Baltimore County experienced the second strongest Management of companies and enterprises recovery of all workforce areas. Of jobs lost between January and April, 140.9% had been recovered by December 2020. Among

workforce areas, Baltimore County experienced the fourth strongest Construction. Of jobs lost between January and April, 115.2% had been recovered by December 2020.

Carroll County Workforce Area

The Carroll County Workforce Area (Carroll) experienced a 16.6% decrease in employment from January 2020 to April 2020, moving from 49,448 jobs to 41,216 over that period. By December 2020, the area recovered 80.9% of lost jobs.

Goods-producing industries in Carroll experienced a 6.7% decrease in employment from January to April 2020. By December 2020, goods-producing industries recovered 64.4% of jobs lost through April. Service-providing industries in Carroll experienced a 19.4% decrease in employment from January to April 2020. By year-end, service-providing industries recovered 82.5% of jobs lost through April, ranked fifth among all workforce areas.



The industries in Carroll with the greatest employment stability at the start of the pandemic were Administrative and support and waste management and remediation services; Finance and insurance; and Professional, scientific, and technical services. Compared to other workforce areas, Carroll had the second most resilient Administrative and support and waste management and remediation services industry, which experienced an increase from January to April of 0.3%. Among all workforce areas, Carroll had the fourth most resilient Finance and insurance industry, which saw a January to April decrease of 1.8%. Carroll had the sixth most resilient Professional, scientific, and technical services industry, which saw a January to April decrease of 3.6%. Compared to an average jobs loss of 13.1% in industries statewide, these industries demonstrated significant stability.



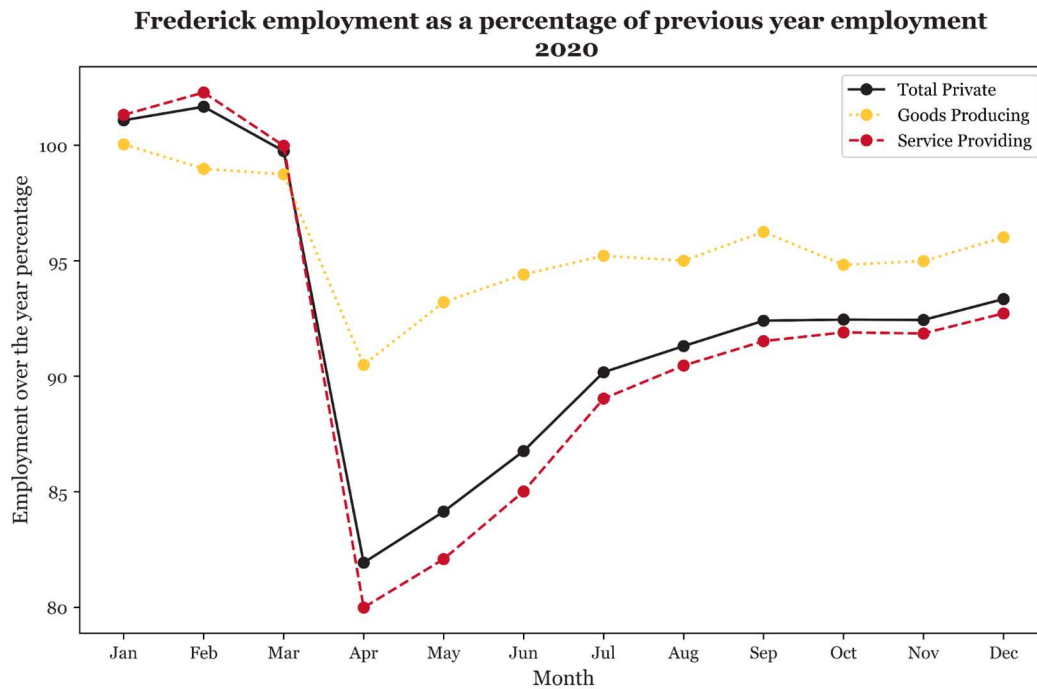
The industries with the strongest employment recoveries in Carroll were Professional, scientific, and technical services; Retail; and Wholesale trade. Carroll experienced the third strongest Professional, scientific, and technical services recovery of all workforce areas. Of jobs lost between January and April, 190.1% had been recovered by December 2020. Carroll experienced the sixth strongest Retail recovery of all workforce areas. Of jobs lost

between January and April, 112.5% had been recovered by December 2020. Carroll experienced the third strongest Wholesale trade recovery of all workforce areas. Of jobs lost between January and April, 93.8% had been recovered by December 2020.

Frederick County Workforce Area

The Frederick County Workforce Area (Frederick) experienced a 17.2% decrease in employment from January 2020 to April 2020, moving from 88,091 jobs to 72,973 over that time. By December 2020, the area recovered 68.5% of lost jobs.

Goods-producing industries in Frederick experienced a 7.8% decrease in employment from January to April 2020. By December 2020, goods-producing industries recovered 84.4% of jobs lost through April, ranked sixth among all workforce areas. Service-providing industries in Frederick experienced a 19.3% decrease in employment from January to April 2020. By year-end, service-providing industries recovered 67.1% of jobs lost through April.



The industries in Frederick with the greatest employment stability at the start of the pandemic were Professional, scientific, and technical services; Finance and insurance; and Construction. Compared to other workforce areas, Frederick had the fifth most resilient Professional, scientific, and technical services industry, which saw a January to April decrease of 2.9%. Finance and Insurance saw a decrease from January to April of 5.8%. Among all workforce areas, Frederick had the third most resilient Construction industry, which saw a January to April decrease of 5.9%. Compared to an average jobs loss of 13.1% in industries statewide, these industries demonstrated significant stability.

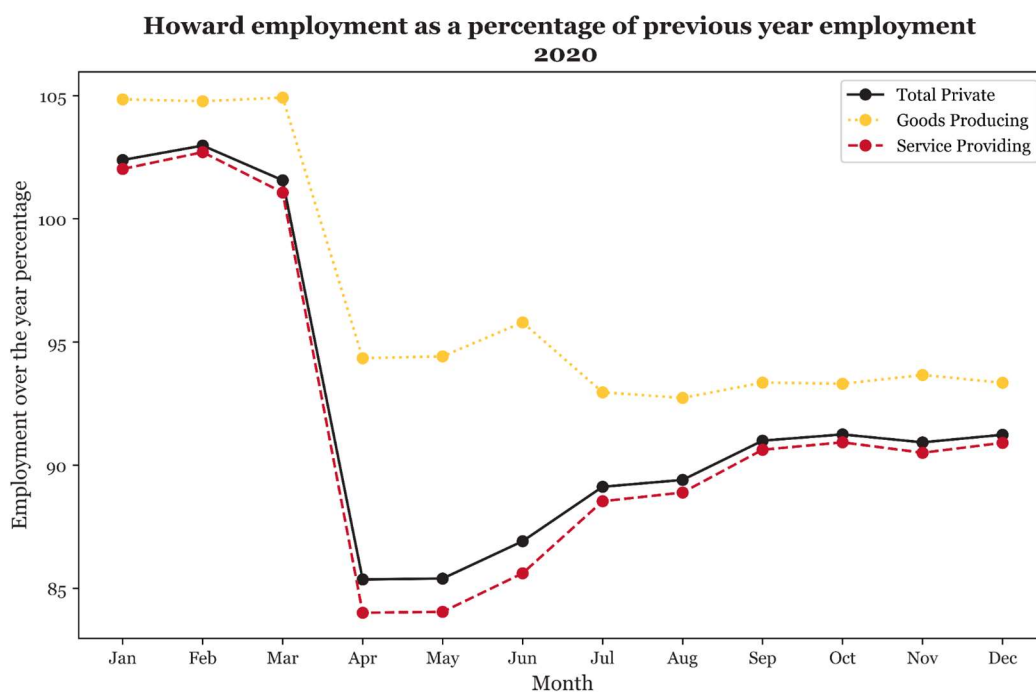


The industries with the strongest employment recoveries in Frederick were Transportation and warehousing; Retail; and Manufacturing. Frederick experienced the fourth strongest Transportation and warehousing recovery of all workforce areas. Of jobs lost between January and April, 216.5% had been recovered by December 2020. Frederick experienced the fourth strongest Retail recovery of all workforce areas. Of jobs lost between January and April, 127.1% had been recovered by December 2020. Of all workforce areas, Frederick experienced the fifth strongest Manufacturing recovery of all workforce areas. Of jobs lost between January and April, 94.7% had been recovered by December 2020.

Howard County Workforce Area

The Howard County Workforce Area (Howard) experienced a 15.6% decrease in employment from January 2020 to April 2020, moving from 157,463 jobs to 132,854 over that time. By December 2020, the area recovered 47.9% of lost jobs.

Goods-producing industries in Howard experienced a 7.1% decrease in employment from January to April 2020. By December 2020, goods-producing industries recovered 26.7% of jobs lost through April. Service-providing industries in Howard experienced a January to April decrease in employment of 16.9%, making it the third most resilient workforce area for service-providing industries. By year-end, service-providing industries recovered 49.3% of jobs lost through April.





The industries in Howard with the greatest employment stability at the start of the pandemic were Information; Finance and insurance; and Professional, scientific, and technical services. Compared to other workforce areas, Howard had the most resilient Information industry, which saw a January to April decrease of 1.2%. Of all workforce areas, Howard had the most resilient Finance and insurance industry, which saw a January to April decrease of 1.3%. Among all workforce areas, Howard had the second most resilient Professional, scientific, and technical services industry, which saw a January to April decrease of 2.1%. Compared to an average jobs loss of 13.1% in industries

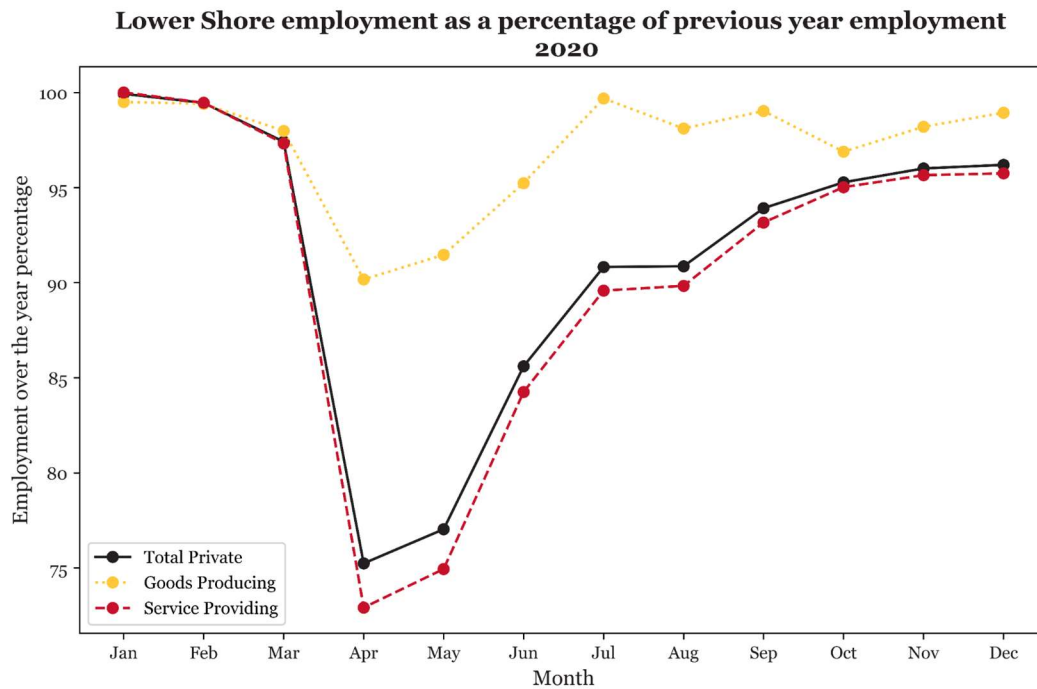
statewide, these industries demonstrated significant stability.

The industries with the strongest employment recoveries in Howard were Management of companies and enterprises; Professional, scientific, and technical services; and Retail. Howard experienced the strongest Management of companies and enterprises recovery of all workforce areas. Of jobs lost between January and April, 178.0% had been recovered by December 2020. By December 2020, 95.1% of Professional, scientific, and technical services jobs lost between January and April had been recovered. 85.8% of Retail jobs lost between January and April had been recovered by December 2020.

Lower Shore Workforce Area

The Lower Shore Workforce Area (Lower Shore), comprised of Somerset, Wicomico, and Worcester counties, experienced a 19.9% decrease in employment from January 2020 to April 2020, moving from 57,253 jobs to 45,849 over that time. By December 2020, the area recovered 98.8% of lost jobs.

Goods-producing industries in Lower Shore experienced a January to April decrease in employment of 6.7%, making it the sixth most resilient workforce area for goods-producing industries. By December 2020, goods-producing industries recovered 126.9% of jobs lost through April, ranked second among all workforce areas. Service-providing industries in Lower Shore experienced a 22.0% decrease in employment from January to April 2020. By year-end, service-providing industries recovered 97.4% of jobs lost through April, ranked second among workforce areas.



The industries in Lower Shore with the greatest employment stability at the start of the pandemic were Utilities; Management of companies and enterprises; and Finance and insurance. Compared to other workforce areas, Lower Shore had the second most resilient Utilities industry, which actually saw an increase from January to April of 1.3%. Among all workforce areas, Lower Shore had the second most resilient Management of companies and enterprises industry, which stayed level from January to April. Finance and Insurance saw a decrease from January to April of 2.5%. Compared to an average jobs loss of 13.1% in industries statewide, these industries demonstrated significant stability.



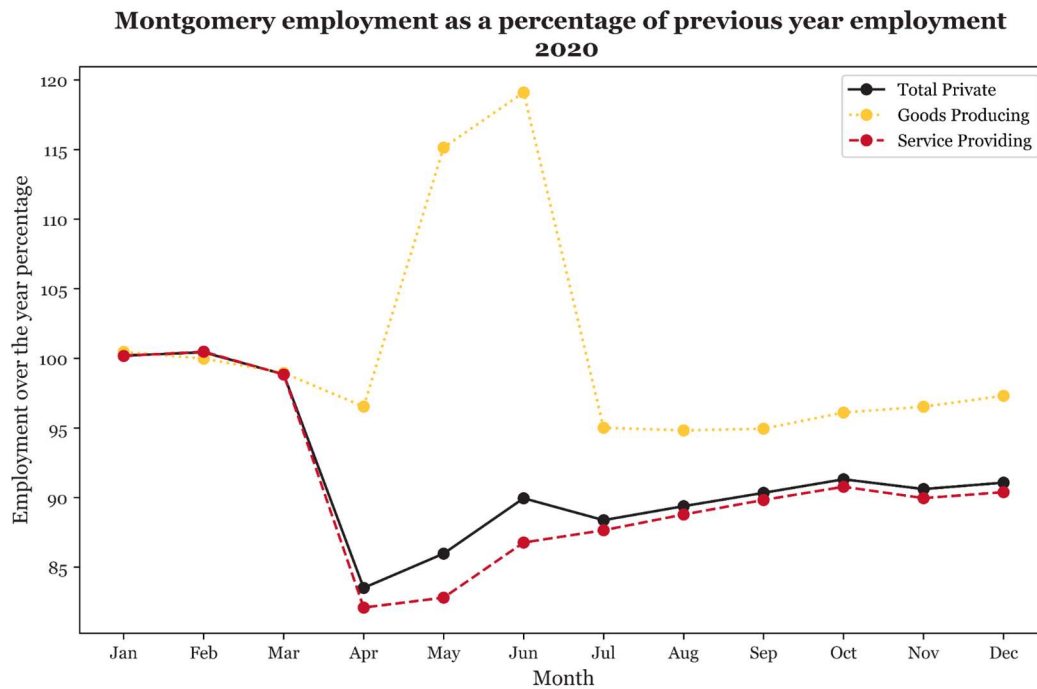
experienced the second strongest Manufacturing recovery of all workforce areas. Of jobs lost between January and April, 151.2% had been recovered by December 2020.

The industries with the strongest employment recoveries in Lower Shore were Administrative and support and waste management and remediation services; Real estate and rental and leasing; and Manufacturing. The Lower Shore experienced the fourth strongest Administrative and support and waste management and remediation services recovery of all workforce areas. Of jobs lost between January and April, 235.1% had been recovered by December 2020. The Lower Shore experienced the third strongest Real estate and rental and leasing recovery of all workforce areas. Of jobs lost between January and April, 210.2% had been recovered by December 2020. The Lower Shore

Montgomery County Workforce Area

The Montgomery County Workforce Area (Montgomery) experienced a 15.7% decrease in employment from January 2020 to April 2020, moving from 377,297 jobs to 317,976 over that time period. By December 2020, the area recovered 55.4% of lost jobs.

Goods-producing industries in Montgomery experienced a January to April decrease in employment of 1.9%, making it the most resilient workforce area for goods-producing industries. By December 2020, goods-producing industries recovered 18.2% of jobs lost through April. Service-providing industries in Montgomery experienced a January to April decrease in employment of 17.2%, making it the fourth most resilient workforce area for service-providing industries. By year-end, service-providing industries recovered 55.8% of jobs lost through April.



The industries in Montgomery with the greatest employment stability at the start of the pandemic were Agriculture, forestry, fishing and hunting; Utilities; and Construction. Compared to other workforce areas, Montgomery had the second most resilient Agriculture, forestry, fishing and hunting industry, which experienced an increase from January to April of 22.0%. Among all workforce areas, Montgomery had the fourth most resilient Utilities industry, which saw a January to April decrease of 1.0%. Compared to the others, Montgomery had the most resilient Construction industry, which saw a January to April decrease of 1.2%. Compared to an average jobs loss of 13.1% in industries statewide, these industries demonstrated significant stability.

The industries with the strongest employment recoveries in Montgomery were Utilities; Finance and insurance; and Professional, scientific, and technical services. Montgomery experienced the strongest Utilities recovery of all workforce areas. Of jobs lost between January and April, 433.3% had been recovered by December 2020. Montgomery experienced the strongest Finance and insurance recovery of all workforce areas. Of jobs lost between January and April, 296.0% had been recovered by December 2020. Of all workforce areas, Montgomery experienced the fourth strongest

Professional, scientific, and technical services recovery of all workforce areas. Of jobs lost between January and April, 161.5% had been recovered by December 2020.

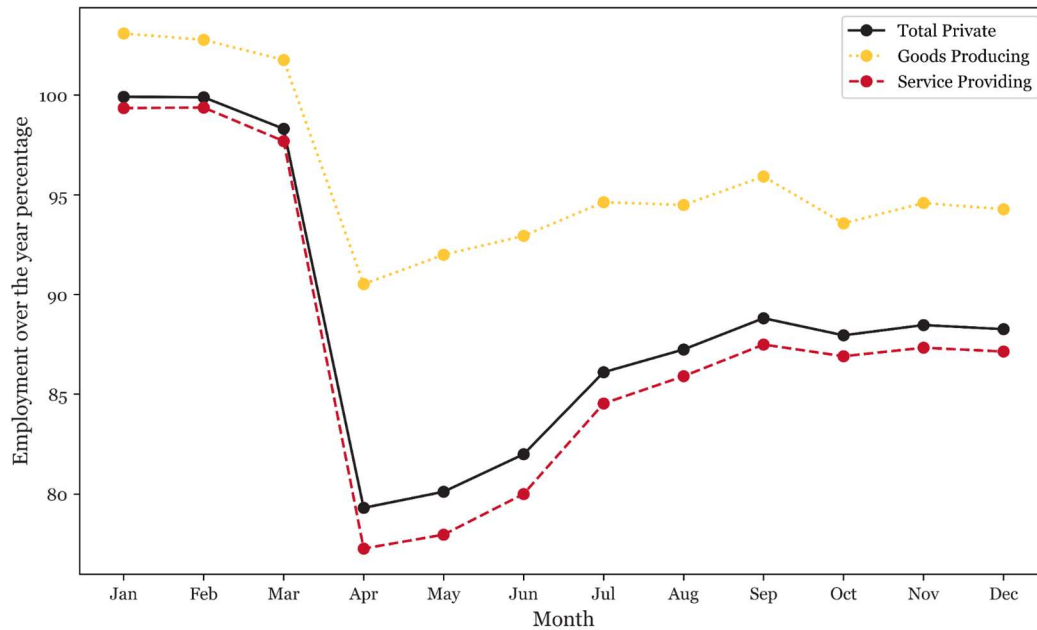


Prince George's County Workforce Area

The Prince George's County Workforce Area (Prince George's) experienced a 19.6% decrease in employment from January 2020 to April 2020, moving from 229,101 jobs to 184,277 over that period. By December 2020, the area recovered 60.6% of lost jobs.

Goods-producing industries in Prince George's experienced a 10.0% decrease in employment from January to April 2020. By December 2020, goods-producing industries recovered 79.9% of jobs lost through April. Service-providing industries in Prince George's experienced a 21.3% decrease in employment from January to April 2020. By year-end, service-providing industries recovered 58.9% of jobs lost through April.

**Prince George's employment as a percentage of previous year employment
2020**



The industries in Prince George's with the greatest employment stability at the start of the pandemic were Utilities; Finance and insurance; and Management of companies and enterprises. Compared to other workforce areas, Prince George's had the fifth most resilient Utilities industry, which saw a January to April decrease of 1.2%. Finance and Insurance saw a decrease from January to April of 2.5%. Among all workforce areas, Prince George's had the fourth most resilient Management of companies and enterprises industry, which saw a January to April decrease of 5.3%. Compared to an average jobs loss of 13.1% in industries statewide, these industries demonstrated significant stability.

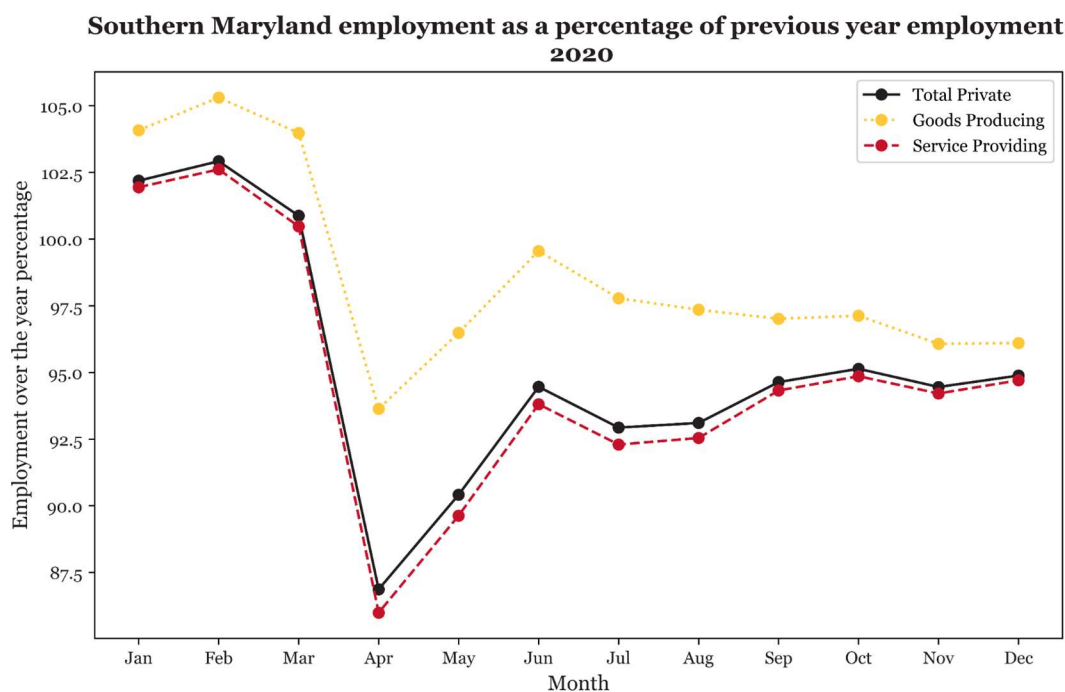


The industries with the strongest employment recoveries in Prince George's were Transportation and warehousing; Manufacturing; and Retail. Prince George's experienced the fifth strongest Transportation and warehousing recovery of all workforce areas. Of jobs lost between January and April, 188.6% had been recovered by December 2020. The workforce area experienced the third strongest Manufacturing recovery of all workforce areas. Of jobs lost between January and April, 103.6% had been recovered by December 2020. By December 2020, 85.5% of Retail jobs lost between January and April had been recovered.

Southern Maryland Workforce Area

The Southern Maryland Workforce Area (Southern Maryland) is comprised of Calvert, Charles, and St. Mary's counties. The area experienced a 14.1% decrease in employment from January 2020 to April 2020, moving from 80,503 jobs to 69,168 over that time. By December 2020, the area recovered 71.9% of lost jobs.

Goods-producing industries in Southern Maryland experienced a 6.7% decrease in employment from January to April 2020. By December 2020, goods-producing industries recovered 67.6% of jobs lost through April. Service-providing industries in Southern Maryland experienced a January to April decrease in employment of 15.0%, making it the second most resilient workforce area for service-providing industries. By year-end, service-providing industries recovered 72.0% of jobs lost through April.





The industries in Southern Maryland with the greatest employment stability at the start of the pandemic were Administrative and support and waste management and remediation services; Finance and insurance; and Professional, scientific, and technical services. Compared to other workforce areas, Southern Maryland had the most resilient Administrative and support and waste management and remediation services

industry, which actually saw an increase from January to April of 80.9%. Among all workforce areas, Southern Maryland had the third most resilient Finance and insurance industry, which saw a January to April decrease of 1.4%. Of all workforce areas, Southern Maryland had the most resilient Professional, scientific, and technical services industry, which saw a January to April decrease of 1.4%. Compared to an average jobs loss of 13.1% in industries statewide, these industries demonstrated significant stability.

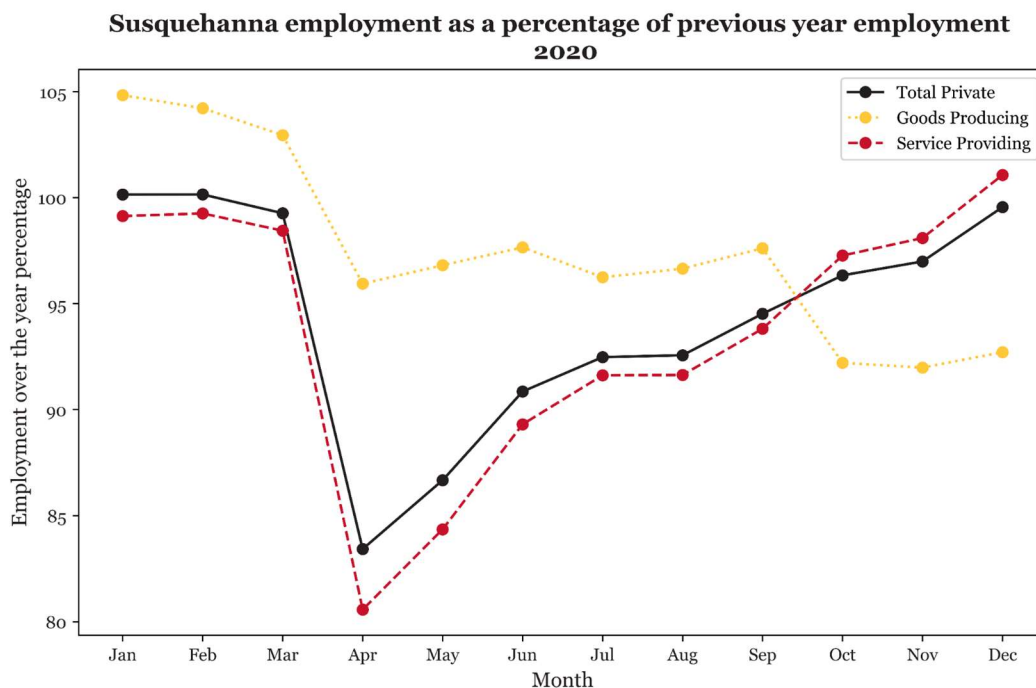
The industries with the strongest employment recoveries in Southern Maryland were Professional, scientific, and technical services; Transportation and warehousing; and Retail. Southern Maryland experienced the strongest Professional, scientific, and technical services recovery of all workforce areas. Of jobs lost between January and April, 238.8% had been recovered by December 2020. By December 2020, 145.3% of Transportation and warehousing jobs lost between January and April had been recovered. 104.7% of Retail jobs lost between January and April had been recovered by December 2020.

Susquehanna Workforce Area

The Susquehanna Workforce Area (Susquehanna) is comprised of Cecil and Harford counties. The area experienced a 16.2% decrease in employment from January 2020 to April 2020, moving from 99,220 jobs to 83,143 over that time. By December 2020, the area recovered 126.3% of lost jobs.

Goods-producing industries in Susquehanna experienced a January to April decrease in employment of 4.0%, making it the third most resilient workforce area for goods-producing industries. By December 2020, goods-producing industries recovered -27.4% of jobs lost through April. Service-providing industries in Susquehanna

experienced a 19.0% decrease in employment from January to April 2020. By year-end, service-providing industries recovered 133.7% of jobs lost through April, ranked first among all workforce areas.



The industries in Susquehanna with the greatest employment stability at the start of the pandemic were Agriculture, forestry, fishing and hunting; Administrative and support and waste management and remediation services; and Manufacturing. Compared to other workforce areas, Susquehanna had the third most resilient Agriculture, forestry, fishing and hunting industry, which experienced an increase from January to April of 19.7%. Among all workforce areas, Susquehanna had the fourth most resilient Administrative and support and waste management and remediation services industry, which saw a January to April decrease of 2.7%. Compared to the others, the Susquehanna County Workforce Area had the most resilient Manufacturing industry, which saw a January to April decrease of 3.2%. Compared to an average jobs loss of 13.1% in industries statewide, these industries demonstrated significant stability.

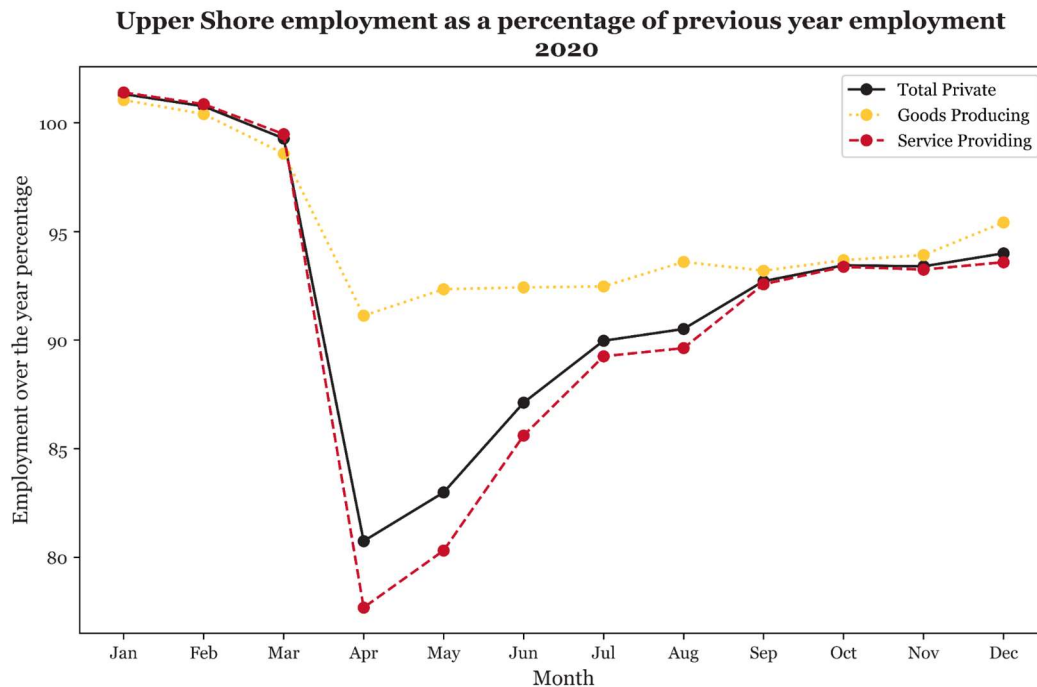
The industries with the strongest employment recoveries in Susquehanna were Transportation and warehousing; Administrative and support and waste management and remediation services; and Real estate and rental and leasing. Susquehanna experienced the strongest Transportation and warehousing recovery of all workforce areas. Of jobs lost between January and April, 1483.1% had been recovered by December 2020. The workforce area experienced the strongest Administrative and support and waste management and remediation services recovery of all workforce areas. Of jobs lost between January and April, 623.9% had been recovered by December 2020. Compared to all other workforce areas, Susquehanna experienced the second strongest Real estate and rental and leasing recovery of all workforce areas. Of jobs lost between January and April, 211.3% had been recovered by December 2020.



Upper Shore Workforce Area

The Upper Shore Workforce Area (Upper Shore) is comprised of Caroline, Dorchester, Kent, Queen Anne's and Talbot counties. The area experienced a 16.5% decrease in employment from January 2020 to April 2020, moving from 51,529 jobs to 43,032 over that period. By December 2020, the area recovered 84.9% of lost jobs.

Goods-producing industries in Upper Shore experienced a January to April decrease in employment of 2.0%, making it the second most resilient workforce area for goods-producing industries. By December 2020, goods-producing industries recovered 109.3% of jobs lost through April, ranked third among all workforce areas. Service-providing industries in Upper Shore experienced a 20.5% decrease in employment from January to April 2020. By year-end, service-providing industries recovered 84.2% of jobs lost through April, ranked fourth among workforce areas.



The industries in Upper Shore with the greatest employment stability at the start of the pandemic were Agriculture, forestry, fishing and hunting; Administrative and support and waste management and remediation services; and Finance and insurance. Compared to other workforce areas, Upper Shore had the most resilient Agriculture, forestry, fishing and hunting industry, which had an employment level increase from January to April of 35.9%. Among all workforce areas, Upper Shore had the third most resilient Administrative and support and waste management and remediation services industry, which saw a January to April decrease of 2.7%. Finance and Insurance saw a decrease from

January to April of 3.9%. Compared to an average jobs loss of 13.1% in industries statewide, these industries demonstrated significant stability.

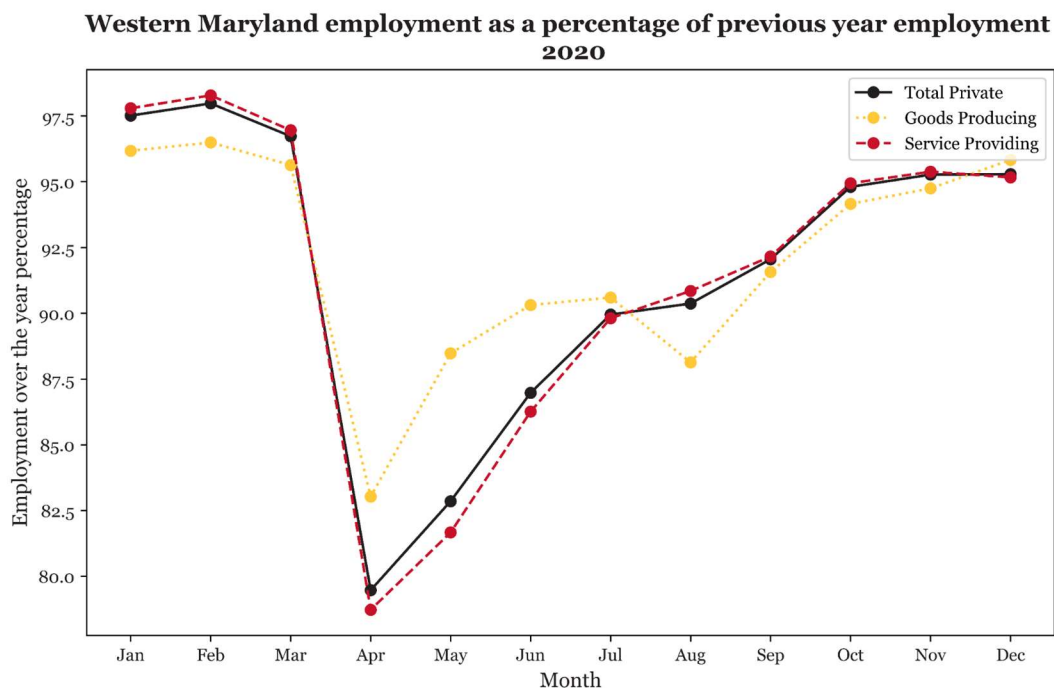
The industries with the strongest employment recoveries in Upper Shore were Administrative and support and waste management and remediation services; Professional, scientific, and technical services; and Construction. Upper Shore experienced the second strongest Administrative and support and waste management and remediation services recovery of all workforce areas. Of jobs lost between January and April, 586.7% had been recovered by December 2020. Upper Shore experienced the second strongest Professional, scientific, and

technical services recovery of all workforce areas. Of jobs lost between January and April, 211.2% had been recovered by December 2020. Of all workforce areas, Upper Shore experienced the strongest Construction recovery. Of jobs lost between January and April, 200.8% had been recovered by December 2020.

Western Maryland Workforce Area

The Western Maryland Workforce Area (Western Maryland) is comprised of Allegany, Garrett and Washington counties. The area experienced a 17.4% decrease in employment from January 2020 to April 2020, moving from 86,894 jobs to 71,733 over that time. By December 2020, the area recovered 85.8% of lost jobs.

Goods-producing industries in Western Maryland experienced a 12.6% decrease in employment from January to April 2020. By December 2020, goods-producing industries recovered 86.6% of jobs lost through April, ranked fifth among all workforce areas. Service-providing industries in Western Maryland experienced a January to April decrease in employment of 18.5%, making it the sixth most resilient workforce area for service-providing industries. By year-end, service-providing industries recovered 85.7% of jobs lost through April, ranked third among all workforce areas.



The industries in Western Maryland with the greatest employment stability at the start of the pandemic were Management of companies and enterprises; Finance and insurance; and Administrative and support and waste

management and remediation services. Compared to other workforce areas, Western Maryland had the third most resilient Management of companies and enterprises industry, which saw a January to April decrease of 0.4%. Among all workforce areas, Western Maryland had the fifth most resilient Finance and insurance industry, which saw a January to April decrease of 2.2%. Compared to the others, Western Maryland had the fifth most resilient Administrative and support and waste management and remediation services industry, which saw a January to April decrease of 3.4%. Compared to an average jobs loss of 13.1% in industries statewide, these industries demonstrated significant stability.

The industries with the strongest employment recoveries in Western Maryland were Administrative and support and waste management and remediation services; Transportation and warehousing; and Real estate rental and leasing. Western Maryland experienced the third strongest Administrative and support and waste management and remediation services recovery of all workforce areas. Of jobs lost



and

between January and April, 339.0% had been recovered by December 2020. The workforce area experienced the third strongest Transportation and warehousing recovery of all workforce areas. Of jobs lost between January and April, 309.4% had been recovered by December 2020. Of all workforce areas, Western Maryland experienced the strongest Real estate and rental and leasing recovery of all workforce areas. Of jobs lost between January and April, 295.3% had been recovered by December 2020.

Data Appendix

The data in the linked file includes a compendium of public data available at <http://labor.maryland.gov/lmi/emppay/> and <https://www.bls.gov/data/>, and simple calculations on that data. For further discussion of the information in these tables, please refer to the first page of the main report, or contact DLWDALLMI-LABOR@maryland.gov.

The data used throughout this report can be found online here:
<https://mwejobs.maryland.gov/admin/gsipub/htmlarea/uploads/EconReportPY2020-AppendixTables.xlsx>.



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